STATE OF TENNESSEE
DEPARTMENT OF GENERAL SERVICES

STEVEN G. CATES
COMMISSIONER

BILL HASLAM
GOVERNOR

Agency Procurement: Generic Asset Ordering

Ordering Assets

Context: You will be using this document if you are attempting to purchase an Item that has been classified as needing an "Asset Tag" by the Assets division of F & A.

It is likely that you will not know this until the first Requisition you put in has been disapproved by Assets. They will send you to the Content Team from there. If a "Generic Asset" Item ID exists for what you are trying to buy, the Content Team will send you this document along with an Item ID that exists to cover the broad category of Item you are trying to buy, if any.

This document can also be used if you know you are trying to buy an Asset, but have not entered a Requisition for it yet.

Summary: Steps in **red** are different from a Standard ePro Requisition with Item IDs

Creating a new Requisition for a Generic Asset

- Create an **Epro Requisition**
- Find an **Item ID** from the **Catalog tab** ending in **"Generic Asset"** (In **Step 2: Add Items and Services**)
- **Add notes** in the **Line Comments** section to **describe** what you are buying **in more detail** (In **Step 3: Review and Submit**)
- **Select** a **Price** and a **Vendor** in the **Line Details** section (In **Step 3: Review and Submit**)
- **Finish** the ePro Requisition.
  - **Fill in Ship-To and Chartfield information.** If it did not default correctly
  - **Budget Check** the Requisition.
  - Use the **Review and Submit** button to **submit** the Requisition for **Approval**.

- Once the Requisition is Approved, copy it to a Purchase Order, then finish the Purchase Order as normal (referenced in the Agency Procurement Manual http://tn.gov/generalserv/purchasing/documents/agencyprocurementmanual.pdf)

CENTRAL PROCUREMENT OFFICE

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Altering an existing Requisition to buy a Generic Asset

- Go into your existing **Epro Requisition.** Go back to **Step 2: Add Items and Services**
- Find an **Item ID** from the **Catalog tab** ending in **"Generic Asset"**
- Add the new Item ID or IDs as a new line, and delete your previous Lines.
- **Add notes** in the **Line Comments** section for your new line to **describe** what you are buying **in more detail** (In **Step 3: Review and Submit**)
- **Select** a **Price** and a **Vendor** in the **Line Details** section (In **Step 3: Review and Submit**)
- **Finish** the ePro Requisition.
  - **Fill in Ship-To and Chartfield information.** If it did not default correctly
  - **Budget Check** the Requisition.
  - Use the **Review and Submit** button to **submit** the Requisition for **Approval**.

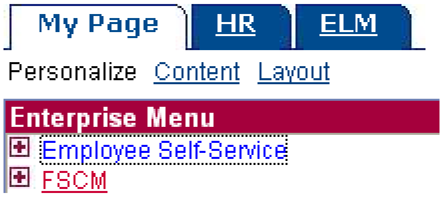
Once the Requisition is Approved, copy it to a Purchase Order, then finish the Purchase Order as normal (referenced in the Agency Procurement Manual
http://tn.gov/generalserv/purchasing/documents/agencyprocurementmanual.pdf

Note: Some *screenshots may not exactly match with previous screenshots within this document*.

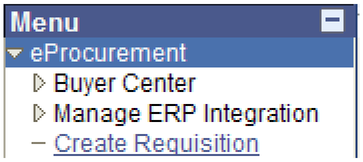
Process: Creating a New Requisition for a Generic Asset

1) You must first be logged in to Edison.

   a. After logging in, click the **FSCM** link under the Enterprise menu, on the left side of the page.

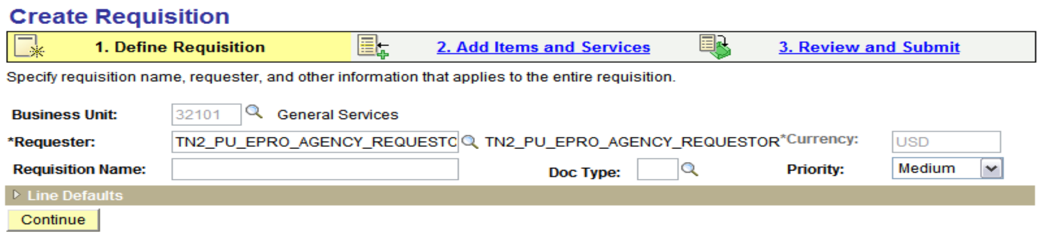

My Page
HR
ELM
Personalize Content Layout
Enterprise Menu
Employee Self-Service
FSCM

   b. Click on **eProcurement** from the left-hand menu.


Menu
eProcurement
Buyer Center
Manage ERP Integration
Create Requisition

   c. Then click **Create Requisition.**

2) Clicking on Create Requisition will bring up a new page, with a title saying **Create Requisition**. This page has links to required sections, grouped under three main tabs. These are numbered in a strip at the top; and the current tab will be highlighted in yellow.


Create Requisition
1. Define Requisition
2. Add Items and Services
3. Review and Submit
Line Defaults
Continue

Specify requisition name, requester, and other information that applies to the entire requisition.

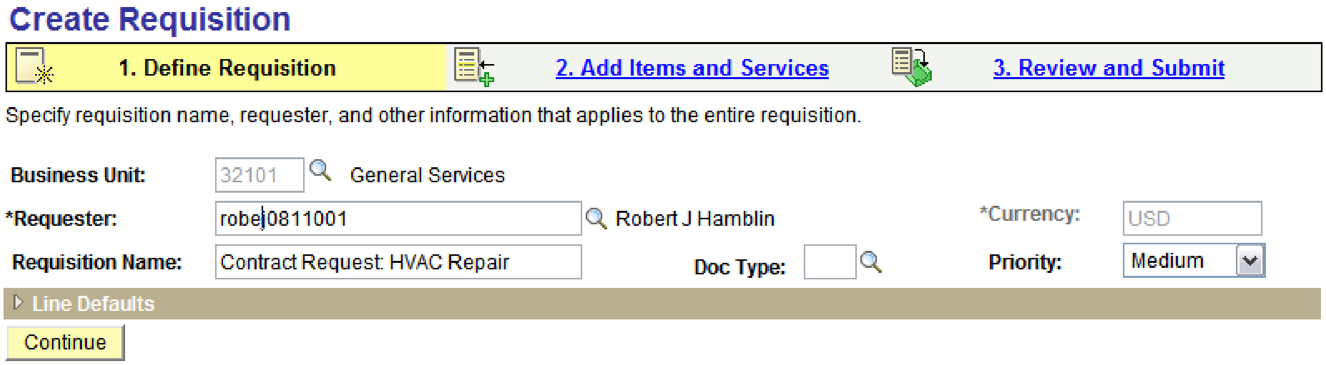
Business Unit: 32101 General Services
*Requester: TN2_PU_EPRO_AGENCY_REQUESTC TN2_PU_EPRO_AGENCY_REQUESTOR
*Currency: USD
Requisition Name:
Doc Type:
Priority: Medium

Step 1: Define Requisition

1. Define Requisition

1) To create a Requisition, the Define Requisitions tab should be highlighted in yellow. If not, click on Define Requisitions. Make sure the Business Unit and Requester defaulted in correctly.

a. **Requisition Name** Click in the **Requisition Name** field and then type in the name. The name must include "Contract Request".

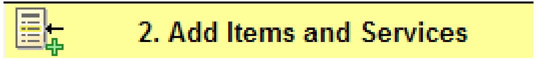

Create Requisition
1. Define Requisition
2. Add Items and Services
3. Review and Submit
Line Defaults
Continue

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: 32101 General Services
*Requester: robe0811001 Robert J Hamblin
*Currency: USD
Requisition Name: Contract Request: HVAC Repair
Doc Type:
Priority: Medium

2) After naming your Requisition, click the Continue Button. Continue

Step 2: Add Items and Services

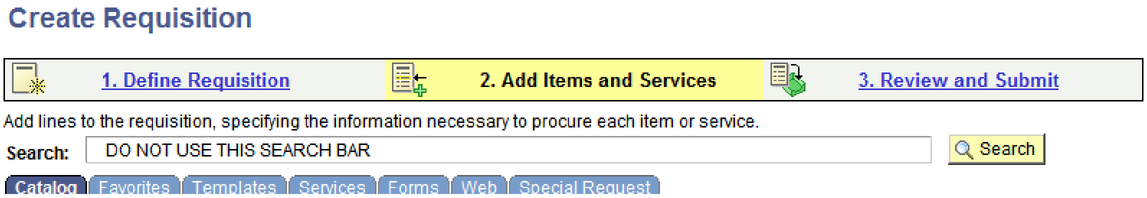

2. Add Items and Services

3) The next step is to add items to the requisition.

4) The main **Add Items and Services** page has 7 tabs at the top, all showing different ways to create Item Lines on a Requisition. For Asset purchases, you will use the **Catalog** tab.

To search for items:

- First, click on the Catalog tab under the Search bar.



Create Requisition

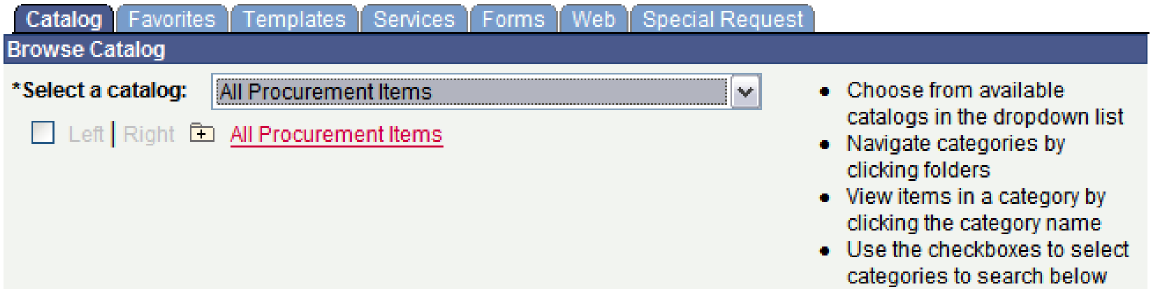
1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: DO NOT USE THIS SEARCH BAR

Search
Catalog
Favorites
Templates
Services
Forms
Web
Special Request

- Next, make sure the **All Procurement Items** catalog is selected from the drop-down menu. This should show as the default option when the Catalog tab is selected.



Browse Catalog

*Select a catalog: All Procurement Items

☐ Left | Right All Procurement Items

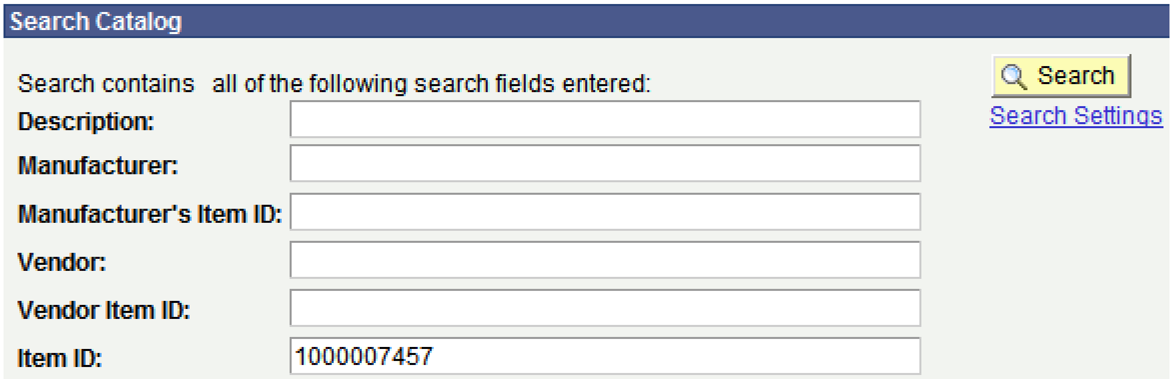
- Choose from available catalogs in the dropdown list
- Navigate categories by clicking folders
- View items in a category by clicking the category name
- Use the checkboxes to select categories to search below

Catalog
Favorites
Templates
Services
Forms
Web
Special Request

- Underneath the catalog listing is the **Search Catalog** section. This contains fields to search by different listings. **This is the ONLY search field that should be used, NOT the one that's at the top of the screen.**

✸ If you have an Item ID (given to you by the Content Team)

- Type the first Item ID (obtained from the Content Team) into the **Item ID** field, then press the Search button. An example is shown below.



Search Catalog

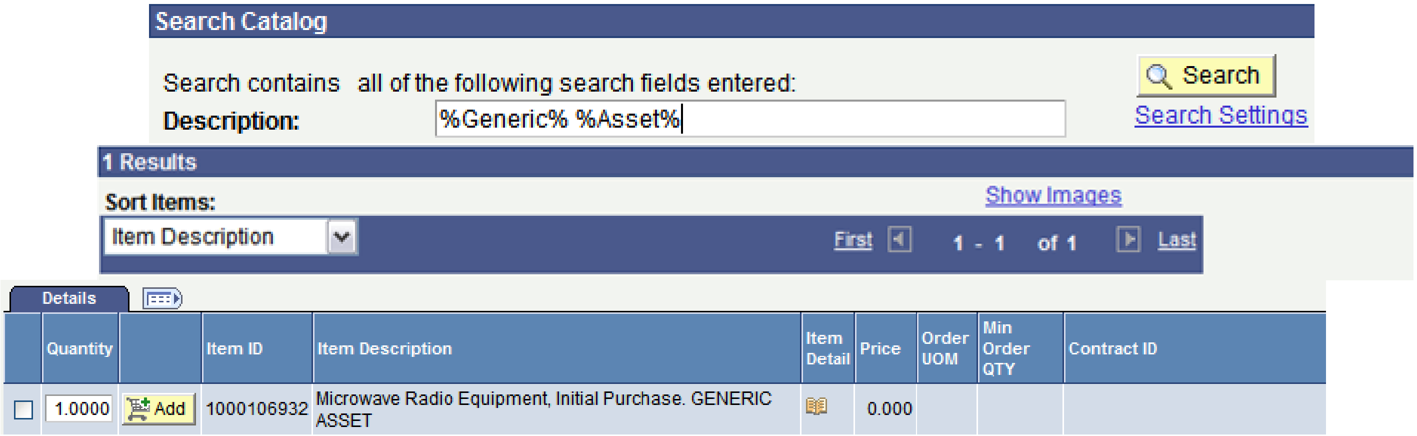
Search contains all of the following search fields entered:

Description:	
Manufacturer:	
Manufacturer's Item ID:	
Vendor:	
Vendor Item ID:	
Item ID:	1000007457

Search
Search Settings

✸ If you do not already have an Item ID (given to you by the Content Team)

- In the **Description** field, search for "**%Generic% %Asset%**" with no quotes. That's a percent sign (**%**), the word **Generic**, a **%**, a space, a **%**, the word **Asset** and another **%**.



Search Catalog

Search contains all of the following search fields entered:

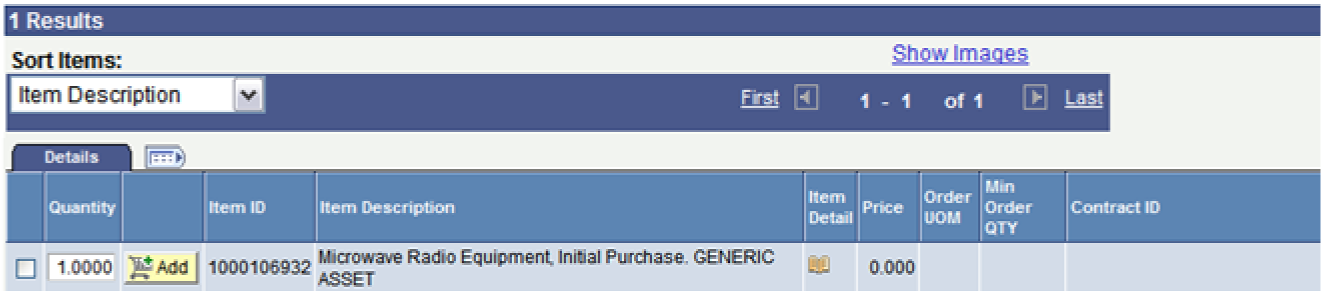
Description: %Generic% %Asset%

1 Results

Sort Items: Item Description

	Quantity		Item ID	Item Description	Item Detail	Price	Order UOM	Min Order QTY	Contract ID
☐	1.0000	Add	1000106932	Microwave Radio Equipment, Initial Purchase. GENERIC ASSET		0.000			

5) If any items meet the search criteria used, they will be displayed below the **Search Catalog** section. The results appear in a table format, with named headers at the tops of the columns.



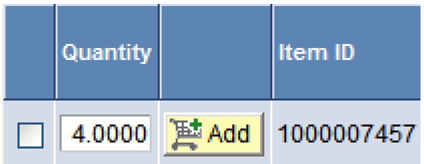
1 Results

Sort Items: Item Description

	Quantity		Item ID	Item Description	Item Detail	Price	Order UOM	Min Order QTY	Contract ID
☐	1.0000	Add	1000106932	Microwave Radio Equipment, Initial Purchase. GENERIC ASSET		0.000			

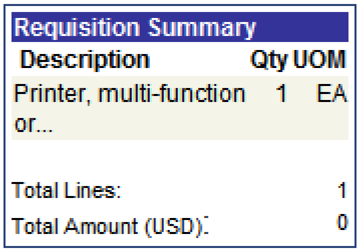
- The "Generic Asset" Item IDs have very general descriptions, and cover broad groups of items based on the NIGP code category they are included within. For example, the Item ID **1000106923** - **Printer, multi-function or not otherwise classified. For microcomputer. GENERIC ASSET** can cover any multi-function office machine that has printing as one of its functions. This Item ID is intended to be used for purchase of any multi-function office machine that is not on contract and has printing as one of its functions.
    - ***Keep this in mind when searching for Generic Assets. Many times, the specific "thing" you are searching for will not be in the list, but a category that "covers" that thing along with others will be.***

- If the item you need was located by the search, check the box next to the item to include the item on the Requisition. Then type the Quantity in the Quantity field.



	Quantity		Item ID
☐	4.0000	Add	1000007457

6) After inputting the desired quantity, click the Add (Add) button. Once added, the item and quantity will appear in the Requisition Summary box on the left side of the page, as shown below.



Requisition Summary

Description	Qty	UOM
Printer, multi-function or...	1	EA

Total Lines: 1

Total Amount (USD): 0

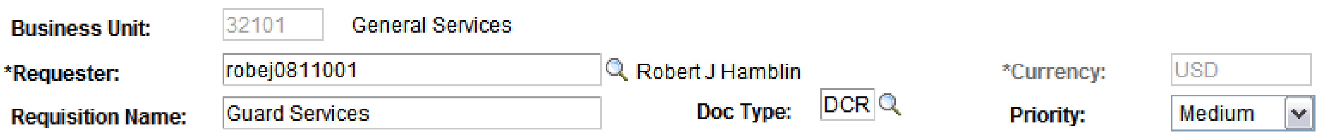
7) Repeat this process for all additional lines that must be on the requisition. After all the requested items appear in the Requisition Summary box on the left side of the page, click the **Review and Submit** tab located at the top right. You will now go to step 3, Review and Submit.

Step 3: Review and Submit

3. Review and Submit

Reviewing and Submitting Requisitions:

The last step of the eProcurement process is the **Review and Submit** page. It contains a summary of the Requisition information, along with notes and Justification. The first thing you must do on this page is enter your Document Type. For Contract Release Orders, use **DCR**. If this is a One-Time Purchase of an Asset, use **LPA.**



Business Unit: 32101 General Services

*Requester: robej0811001 Robert J Hamblin

*Currency: USD

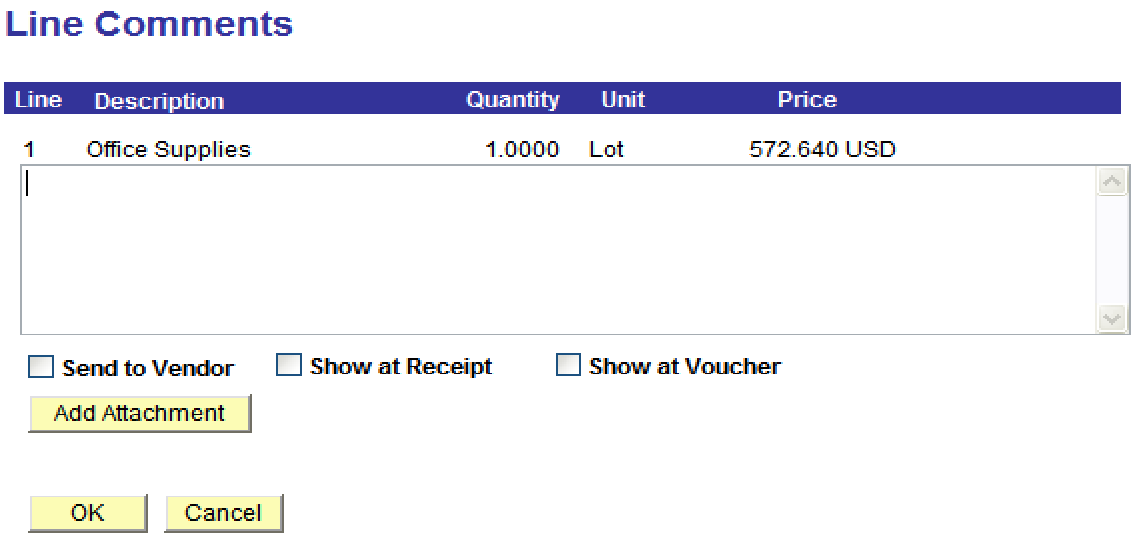
Requisition Name: Guard Services

Doc Type: DCR

Priority: Medium

1) You can now add any additional information to the **Line Comments** section. There is a Comments icon for each line, located on the far right of the page. Click the Comments icon (💬) to go to the Comments screen, where you can either type information directly into the field or add supplemental documents as attachments.

Note: If you are ordering a **Generic Asset**, you must include a full description of the item in the **Line Comments** section**.**


Line Comments

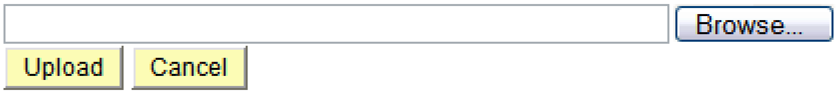
Line	Description	Quantity	Unit	Price
1	Office Supplies	1.0000	Lot	572.640 USD

☐ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

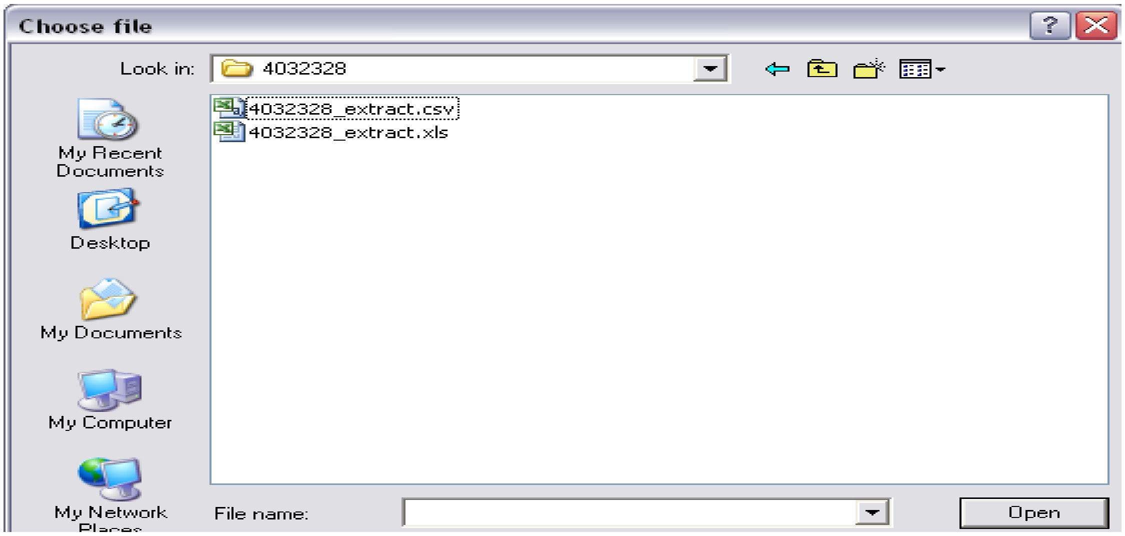
Add Attachment
OK
Cancel

To attach any supplemental information that is contained in a separate Word, PDF or Excel document:

1. Click the **Add Attachment** button. (Add Attachment) This takes you to the Add Attachment page.


Browse...
Upload
Cancel

2. Click the **Browse** button (Browse...). This opens up a window to let you search for files on your computer.


Choose file

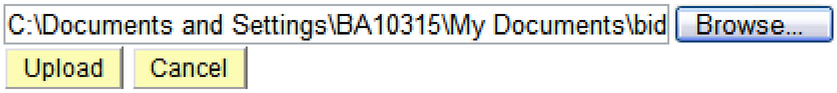
Look in: 4032328

4032328_extract.csv
4032328_extract.xls

File name:

My Recent Documents
Desktop
My Documents
My Computer
My Network Places
Open

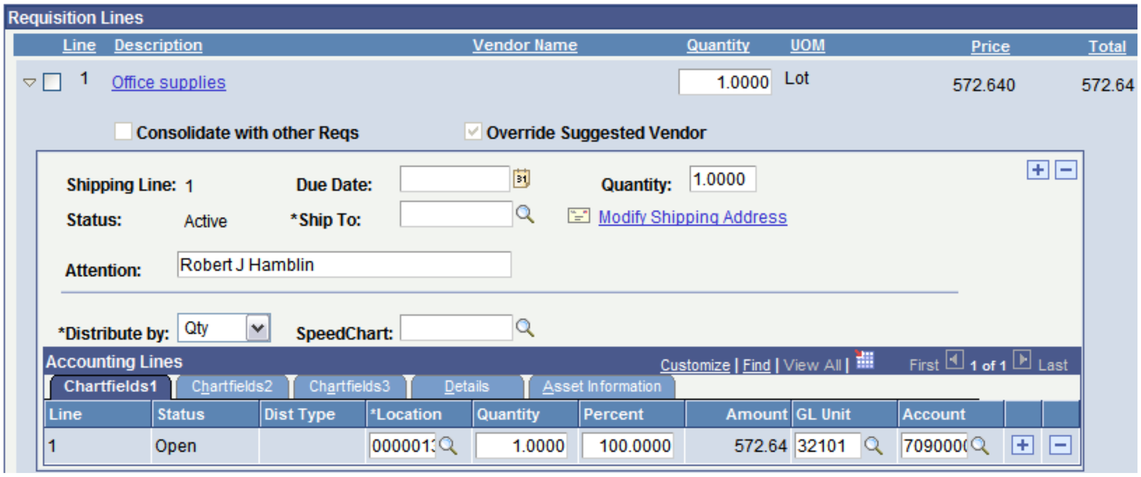
3. Select the file, then click the **Open** button (Open). This takes you back to the Attachment page, with your filename located in the window.


C:\Documents and Settings\BA10315\My Documents\bid
Browse...
Upload
Cancel

4. Click the **Upload** button (Upload) once the file is found.

5. Repeat for all necessary files on that line.

2) Once all Attachments and Comments are entered, clicking OK on the Line Comments screen will take you back to the main page.


Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Office supplies		1.0000	Lot	572.640	572.64

☐ Consolidate with other Reqs ☑ Override Suggested Vendor

Shipping Line: 1
Due Date:
Quantity: 1.0000
Status: Active
*Ship To:
Attention: Robert J Hamblin
*Distribute by: Qty
SpeedChart:

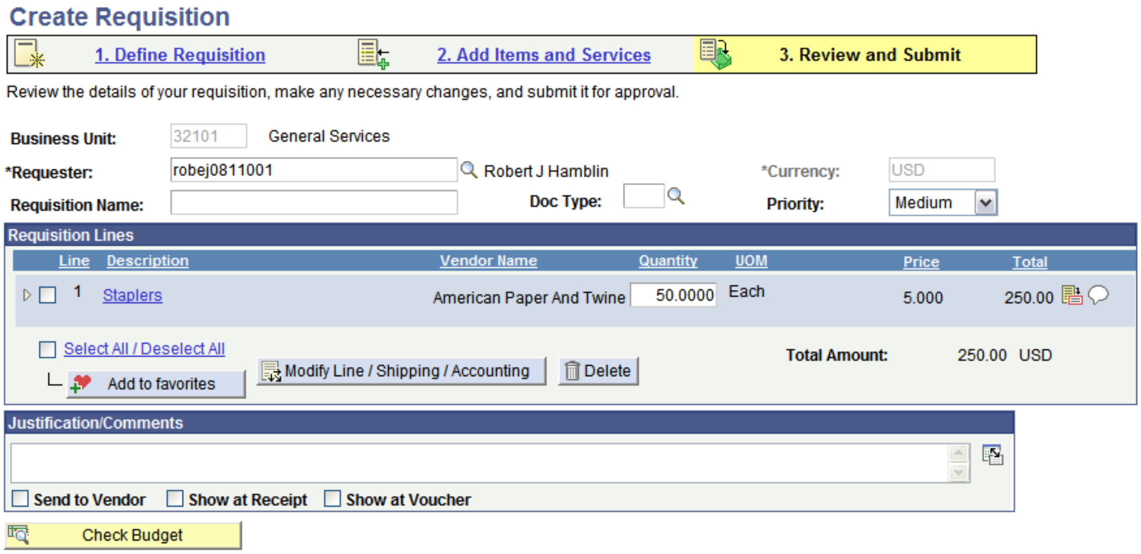
Modify Shipping Address
Accounting Lines
Customize | Find | View All |
First 1 of 1 Last
Chartfields1
Chartfields2
Chartfields3
Details
Asset Information

Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Account
1	Open		000001	1.0000	100.0000	572.64	32101	709000

Note: Supplemental information for Generic Asset Items

You must enter supplemental information on the Line Details screen to be able to process the order.

On the main Review and Submit page, scroll to the right of the screen and click on the **Line Details** icon. This is located next to the Total (shown below as 250.00).


Create Requisition
1. Define Requisition
2. Add Items and Services
3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: 32101 General Services

*Requester: robej0811001 Robert J Hamblin

*Currency: USD

Requisition Name:

Doc Type:

Priority: Medium

Requisition Lines

	Line	Description	Vendor Name	Quantity	UOM	Price	Total
☐	1	Staplers	American Paper And Twine	50.0000	Each	5.000	250.00

☐ Select All / Deselect All

Total Amount: 250.00 USD

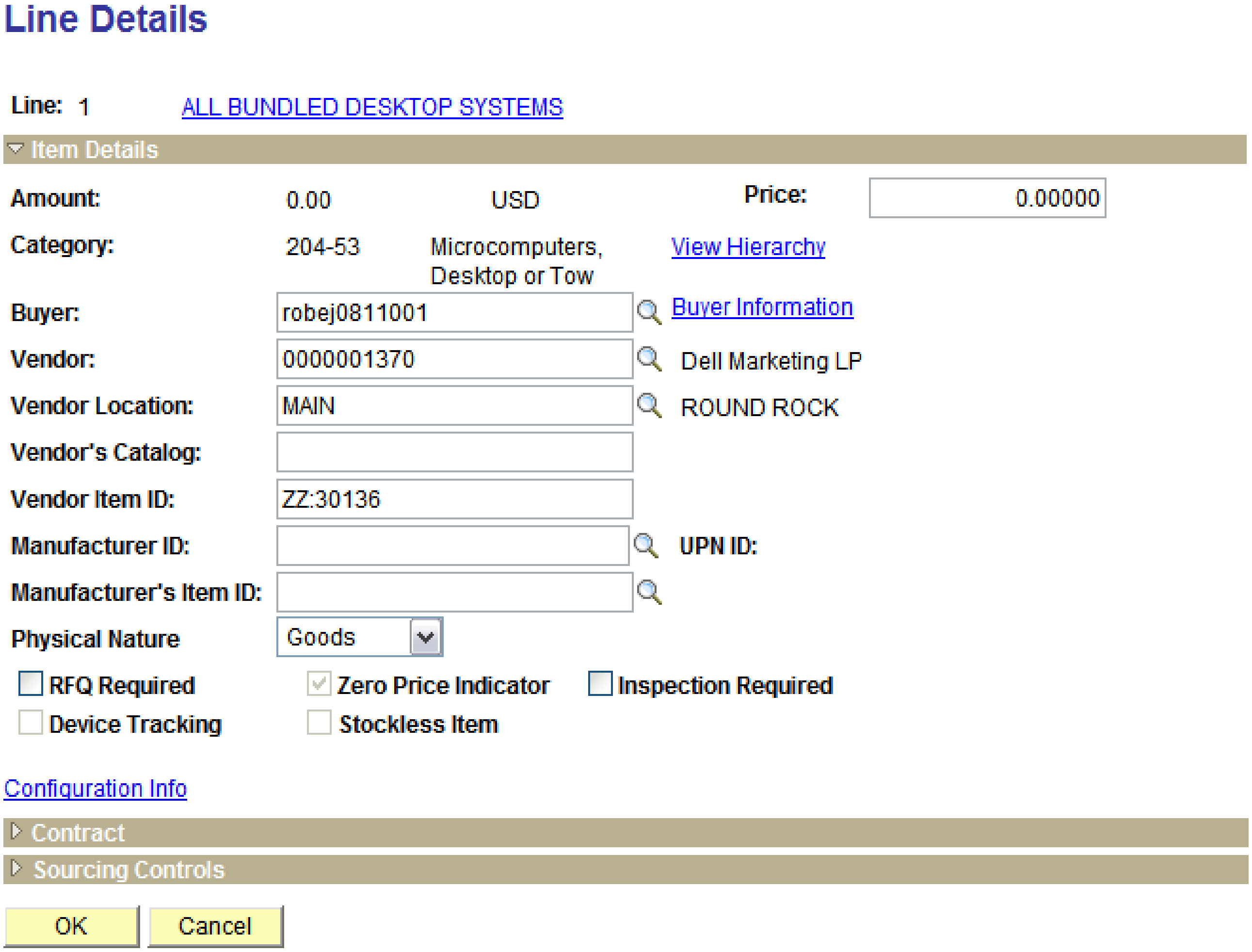
Add to favorites
Modify Line / Shipping / Accounting
Delete

Justification/Comments

☐ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

Check Budget

Clicking the **Line Details** icon will bring you to the **Line Details** page.


Line Details

Line: 1 ALL BUNDLED DESKTOP SYSTEMS

Item Details

Amount: 0.00 USD

Price: 0.00000

Category: 204-53 Microcomputers, Desktop or Tow

View Hierarchy

Buyer: robej0811001

Buyer Information

Vendor: 0000001370 Dell Marketing LP

Vendor Location: MAIN ROUND ROCK

Vendor's Catalog:

Vendor Item ID: ZZ:30136

Manufacturer ID:

UPN ID:

Manufacturer's Item ID:

Physical Nature: Goods

☐ RFQ Required ☑ Zero Price Indicator ☐ Inspection Required

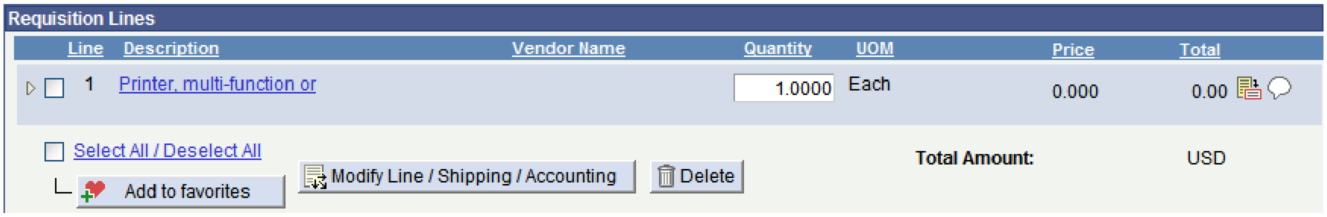
☐ Device Tracking ☐ Stockless Item

Configuration Info
Contract
Sourcing Controls
OK
Cancel

*Note: If you cannot see the "**Price**" field **(ONLY** on Generic Asset items), you will need to contact the Content Team to see if the item is set up properly. If the item is set up properly (as confirmed by the Content Team), you will need to contact the Edison Help Desk to have the correct Requester Setup added to your access.

- **Price:** Change the price to reflect the vendor's true price.
- **Vendor:** Select the vendor to be used.
- **Vendor Location:** Select the correct Vendor Location.
- **Vendor Item Number:** Enter the correct Vendor Item Number.

3) Then press the OK button at the bottom of the page to return to the main Review and Submit page.


Requisition Lines

	Line	Description	Vendor Name	Quantity	UOM	Price	Total
▷ ☐	1	Printer, multi-function or		1.0000	Each	0.000	0.00

☐ Select All / Deselect All

Total Amount: USD

4) Once all attachments are included for each line, review the lines to make sure they are correct. To view the entire line table, scroll to the right using the scrollbar at the bottom of the screen.

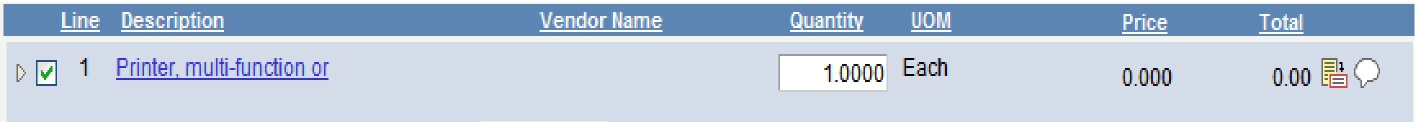
Possible Changes:

Altering Quantity:

The Line, Description, Vendor Name, Quantity, UOM, Price and Total are all pulled over from Step 2. If changes need to be made to the Quantity, click on the Quantity field and type in the new amount.

Deleting Lines: To be used if you are altering an existing Requisition to include Generic Asset IDs

If you have added Item IDs to an existing Requisition: After adding the new lines, you must deleted the old one. In Step 3: Review and Submit, click the check box next to the previous line you want to delete.



	Line	Description	Vendor Name	Quantity	UOM	Price	Total
▷ ☑	1	Printer, multi-function or		1.0000	Each	0.000	0.00

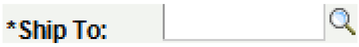
Then press the Delete button.

This will delete the line. If you only have one line, you cannot delete it. **Once a line is deleted it cannot be recovered. You must re-enter the line from step 2, (Enter Line Items) if you delete it and then need it back.**
This can also be used to delete any mistakenly-entered lines.

Sections to Review/Modify:

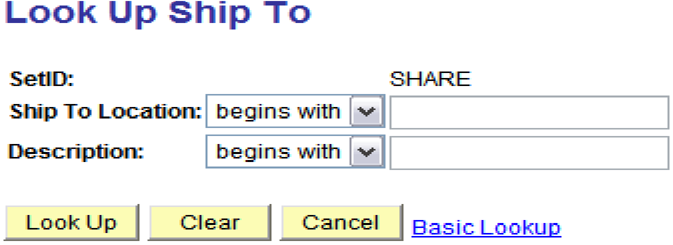
Shipping Addresses:

To modify a Shipping Address, you must first expand the table by using the Expand Section button. This will show the ***Ship-To** field. It may be blank, or may default to PMFMSHIPTO, both of which must be changed.



***Ship To:**

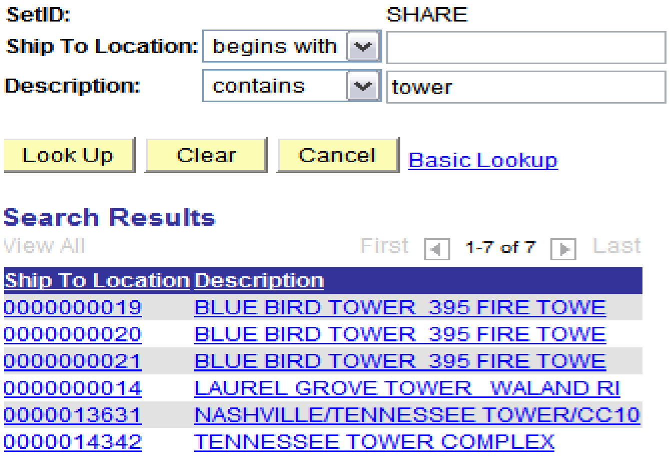
- Click the Lookup Icon (🔍) next to the Ship-To field. This brings you to the Look Up Ship To page.



Look Up Ship To

SetID: SHARE
Ship To Location: begins with
Description: begins with

  - Use the Look Up Ship To screen to find your specific Ship To location. Type part of your building name or address into the **Description** field. Change the drop-down from "begins with" to "contains". Then press the Look Up button. This will pull up a list of agency locations.

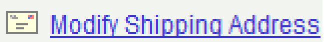


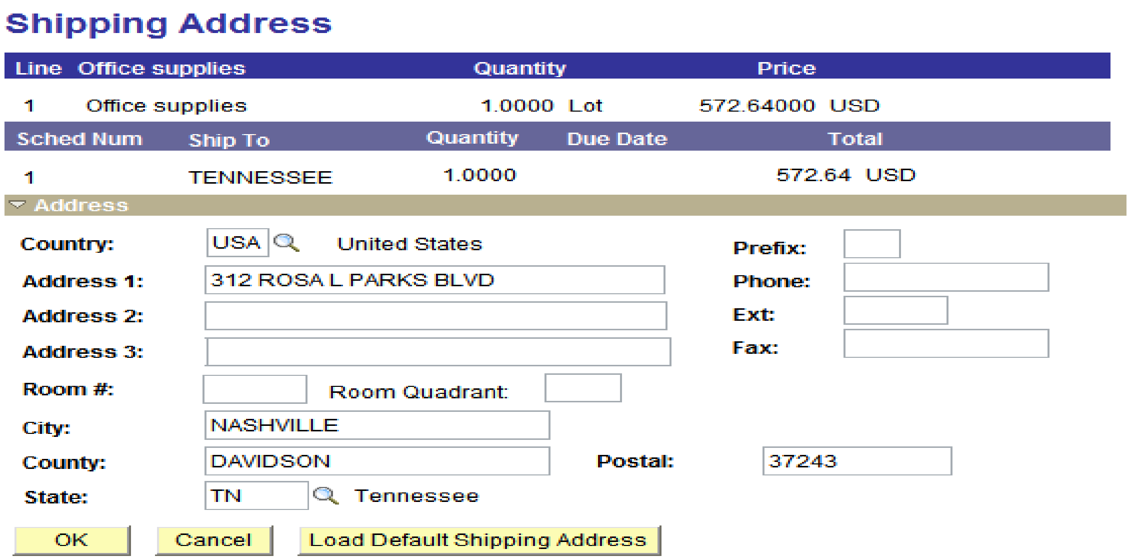
SetID: SHARE
Ship To Location: begins with
Description: contains tower

Search Results

Ship To Location	Description
0000000019	BLUE BIRD TOWER 395 FIRE TOWE
0000000020	BLUE BIRD TOWER 395 FIRE TOWE
0000000021	BLUE BIRD TOWER 395 FIRE TOWE
0000000014	LAUREL GROVE TOWER WALAND RI
0000013631	NASHVILLE/TENNESSEE TOWER/CC10
0000014342	TENNESSEE TOWER COMPLEX

Click the location that seems correct. This will send you back to the main page. Use the Modify Shipping Address link, located to the right of the Ship-To field to check the pulled address. This brings up the address information tied to that Ship-To location.





Shipping Address

Line	Office supplies	Quantity	Price
1	Office supplies	1.0000 Lot	572.64000 USD

Sched Num	Ship To	Quantity	Due Date	Total
1	TENNESSEE	1.0000		572.64 USD

Address

Country: USA United States
Address 1: 312 ROSA L PARKS BLVD
Address 2:
Address 3:
Room #:
Room Quadrant:
City: NASHVILLE
County: DAVIDSON
Postal: 37243
State: TN Tennessee
Prefix:
Phone:
Ext:
Fax:

Verify that the information is correct. If it is not, choose a different Ship-To location. From here, you can continue on with the Requisition.

Chartfields:

All Chartfield ("Accounting") information should default in based on the User's Profile preferences.

Each of the fields listed below must have information populated in them.

- Location: Found on the Chartfields1 tab.
- GL Unit: Found on the Chartfields1 tab.
- Account: Found on the Chartfields1 tab.
- Fund: Found on the Chartfields2 tab.
- Department: Found on the Chartfields2 tab.
- Location CF: Found on the Chartfields2 tab.

If this is not the case, this means one of two things. Either the user's setup is incorrect, or the user is a "Buyer" for many separate locations at an agency (Centralized Procurement).

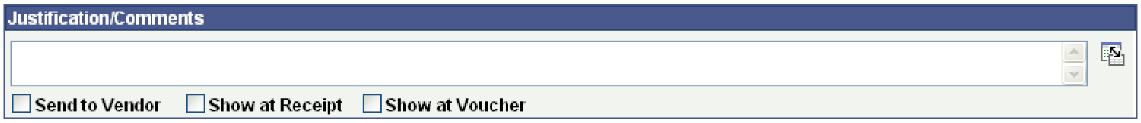
- If the user's setup is incorrect, and they must contact the Edison Helpdesk to request that their access, rolemapping and preferences be corrected. They may need to work with their Agency Fiscal Office and Agency Security Administrator for more information on this process.
  - If the user is a Centralized Procurement officer for many locations in their agency, they will have to work with their Agency Fiscal Office to obtain all the correct Chartfield information for each location they buy for.

The Central Procurement Office is not able to view, access, change or review individual Account Preferences, and does not have access to what the "correct" Account/Chartfield information should be for any given location. This is the sole responsibility of the Agency and Agency Fiscal Office.

☐ **Repeat as necessary for all lines**

Justification/Comments:

This section is located at the bottom of the Review and Submit page, and is used to record the justification for ordering an item from a contract. Click in the field and begin typing.



Justification/Comments

☐ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

You must include:

- "Submitting Order for Asset Item." (This must be at the beginning of the comment)
- A detailed explanation of what the request is for. This would be something like “This is an order from Contract for Security Guard Services”.
- Your contact information, including name and phone number.

Once all this information is completed, you can review the Justification as a whole by checking the "Expand Section" button ( ).

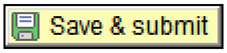
After the justification section is completed, you must Budget Check the document.

Budget Check

1) To Budget Check the Requisition, press the “Check Budget” button. This must be completed in order to pre-encumber funds. The Budget Check Status will return as "Valid" once Budget Check is completed.

Check Budget

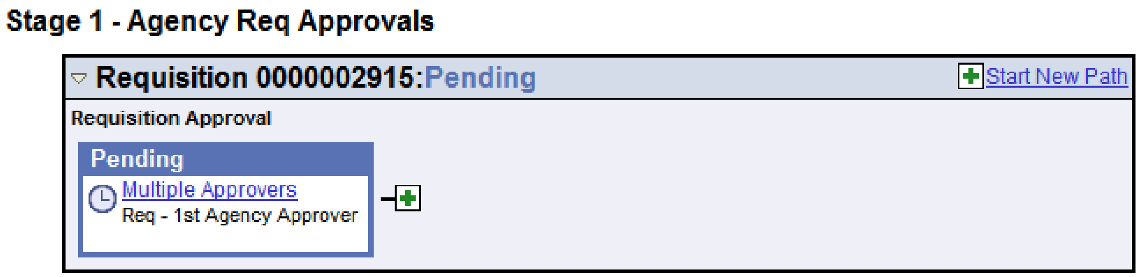
2) After Budget Check, press the “Save and Submit” button to send the Requisition for Approvals.



3) Once the Requisition has been saved, a screen appears showing the approval path. It will have a **Requisition ID** number underneath the Requisition Name. This is used to search for the Requisition if needed later. This screen also shows the Approval paths.

Approvals

a) To view more information on the approvers, click on the "Multiple Approvers" (Multiple Approvers) link. This will bring up a window with a list of all the approvers currently assigned to the Requisition.



Stage 1 - Agency Req Approvals

Requisition 0000002915:Pending

Start New Path

Requisition Approval

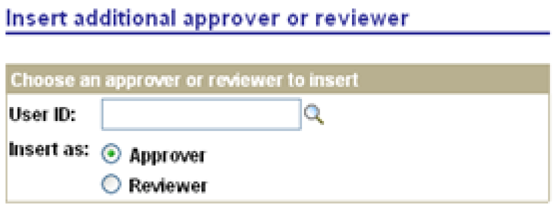
Pending

Multiple Approvers

Req - 1st Agency Approver

b) T o add additional approvers, click the Insert Approver button. (⊞) This will bring up a new window. Select the User ID of the approver to be added by clicking the Lookup button (🔍) next to the User ID field, then selecting the User ID from the list. ***The Approver you wish to add must be in the system as an Approver before you can select them.***

- **i.** Use the Radio Buttons below the User ID Field (◉) to select if the person will be added as an Approver or Reviewer. Reviewers receive a notice through their Workflow to review the item, but are not required to approve. Approvers *must* approve to continue the process.



Insert additional approver or reviewer

Choose an approver or reviewer to insert

User ID:

Insert as: ◉ Approver

○ Reviewer

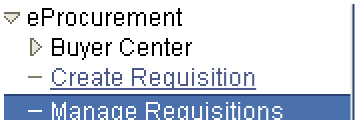
- **ii.** After selecting the Approver's User ID and their function (Approver or Reviewer), click the Insert (Insert) button. This returns you to the main approval screen.

Requisitions must pass all approvals before being sent on to create a Purchase Order.

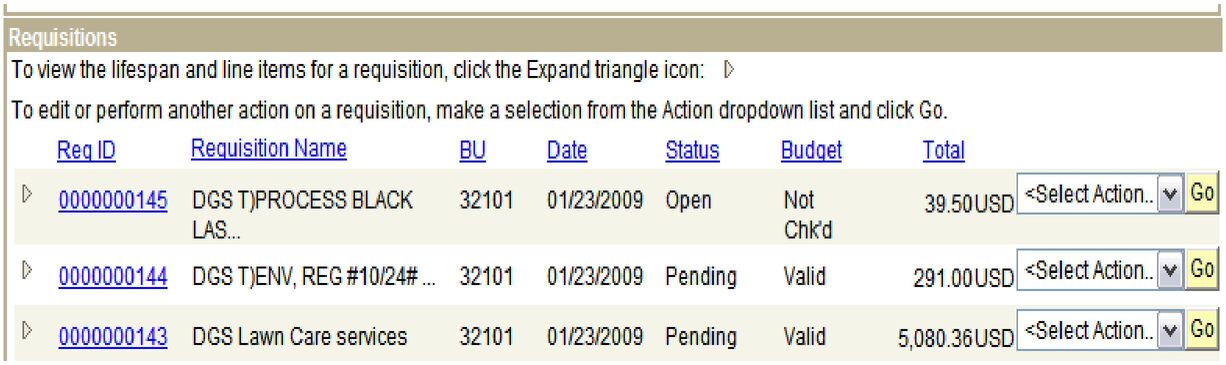
- ✷ **Note on Approvals:** The eProcurement Requisition process is being taught as the main method for all forms of Procurement because it automatically builds necessary approvals based on the item's NIGP code, the dollar amount of the purchase and the business unit. These approvals are set up in Workflow by Edison, and include all ***commodity approvals***.

- ✷ Any problems with Workflow need to be called in as a ticket to the Edison Helpdesk (741-4357).

To view the status of the Requisition, go to the Manage Requisitions page. Click eProcurement, then Manage Requisitions.



Scroll down until the Requisition number is found, or use the Search function to search by the Requisition ID (**Requisition ID:**).
The Approval Status and Budget Check status of the Requisition are listed in this table.



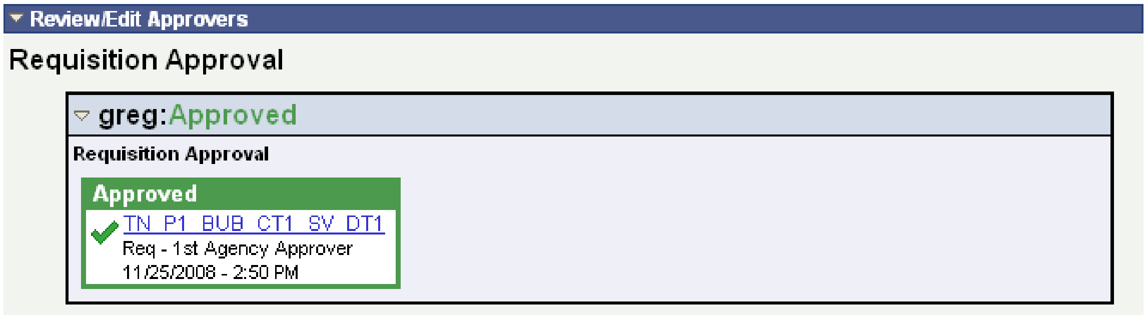
Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▷

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

	Req ID	Requisition Name	BU	Date	Status	Budget	Total	
▷	0000000145	DGS T)PROCESS BLACK LAS...	32101	01/23/2009	Open	Not Chk'd	39.50USD	<Select Action.. Go
▷	0000000144	DGS T)ENV, REG #10/24# ...	32101	01/23/2009	Pending	Valid	291.00USD	<Select Action.. Go
▷	0000000143	DGS Lawn Care services	32101	01/23/2009	Pending	Valid	5,080.36USD	<Select Action.. Go

○ Once the Approvals have been met, the Requisition Approval screen will change to show that the Requisition has been approved. See the picture below for an example.



Review/Edit Approvers

Requisition Approval

greg:Approved

Requisition Approval

Approved

✓ TN_P1_BUB_CT1_SV_DT1
Req - 1st Agency Approver
11/25/2008 - 2:50 PM

When the Requisition is approved, you are ready to proceed with creating the Purchase Order.